

Contract Management: Basic Configuration

Maintain a secure and efficient environment by improving routing, notification, review and approval in your contract management scenario.

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Laserfiche can help improve routing, notification, review and approval in any contract management scenario. This basic scenario – one that many Laserfiche users face – demonstrates how [Laserfiche Workflow](#) creates a strict review process and maintains an efficient, secure environment.

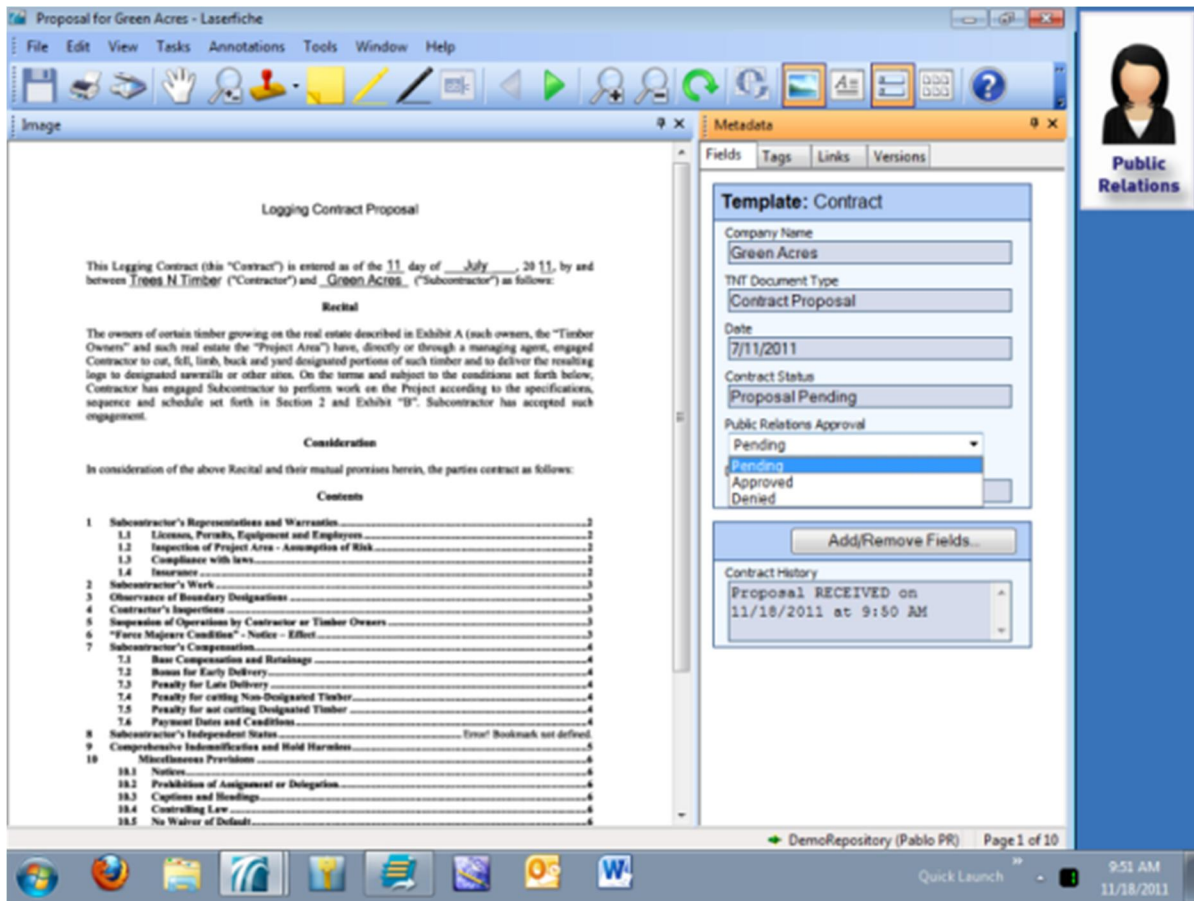
In this scenario, a contract workflow is initiated by importing a proposal.

- This proposal can be imported into Laserfiche using Laserfiche Scanning, Laserfiche Quick Fields, or drag and drop.
- At this point, Laserfiche Workflow is initiated.
- A standard contract is copied by Laserfiche Workflow from a forms library and placed with the proposal.

Public Relations

Often members of the **Public Relations** team will be required to check contracts to ensure that the contract will not harm the company image.

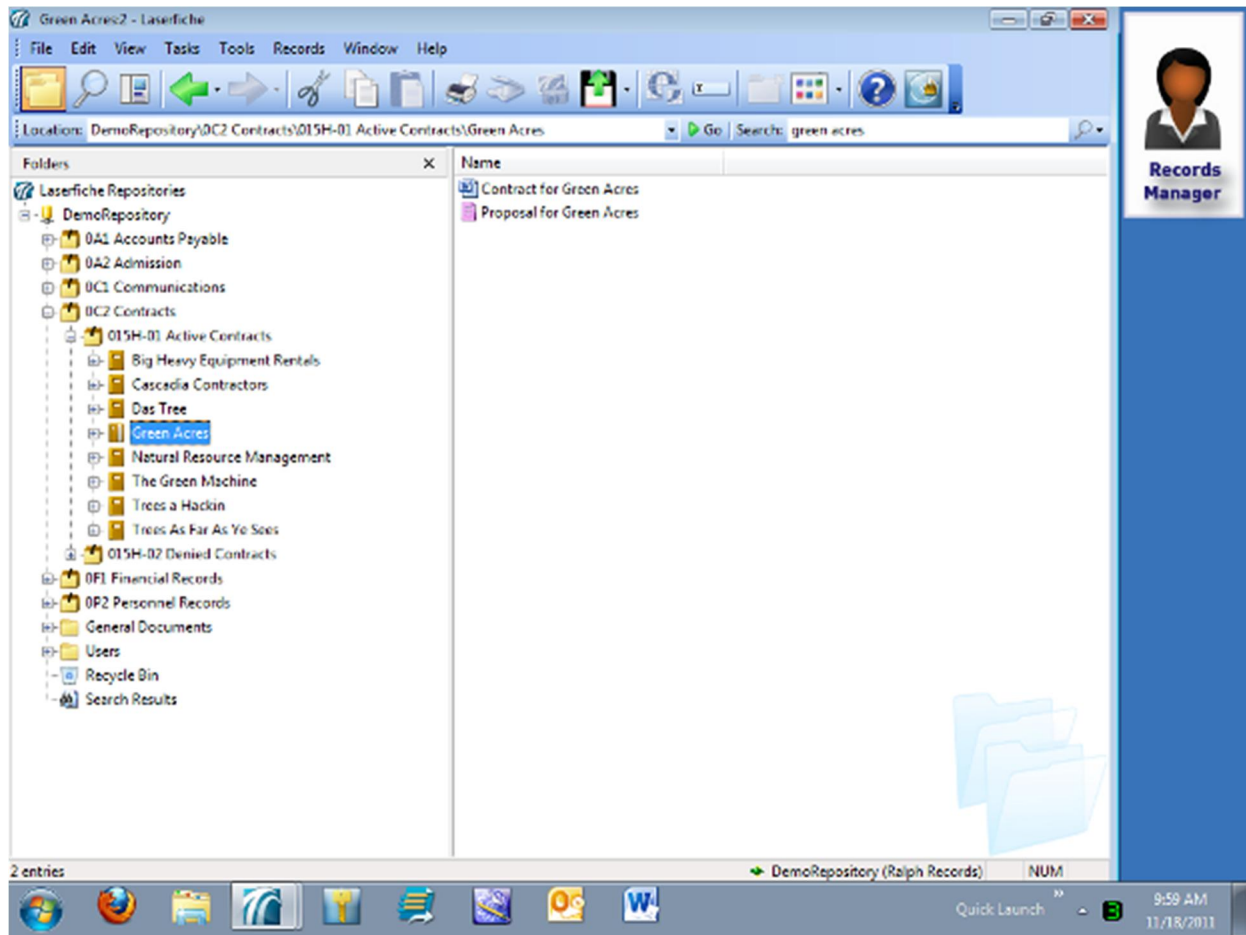
- The Public Relations Manager is not required to have any other involvement with the contract process past approving the contract.
- Their access can be limited to an initial inspection.
- After the Public Relations Manager has approved the contract, the document will disappear from their folder view.



Records Manager

The document will then enter the domain of the **Records Manager**.

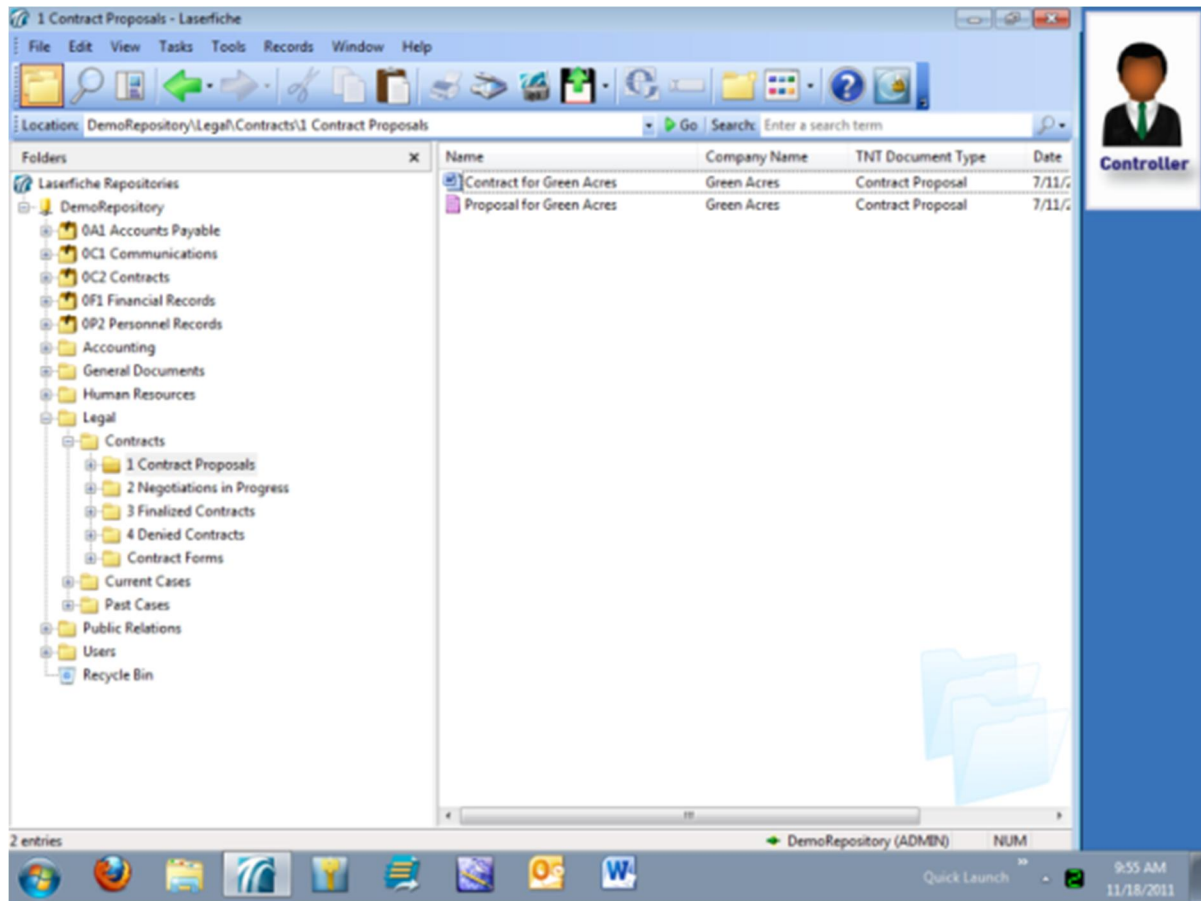
- Throughout this entire process, the Records Manager retains a copy of the contract but will not be able to edit or manipulate the contract in any form.



Controller

In addition to sending the contract to the Public Relations Manager and the Records Manager, Laserfiche Workflow also sends a copy to the **Financial Controller**.

- The Financial Controller will receive a notification that a contract requires their approval.
- They will be able to open and edit the contract using Microsoft Word.
- They can view a series of folders that align with each stage of the contract negotiation process:
 1. Contract Proposals
 2. Negotiations in Progress
 3. Finalized Contracts
 4. Denied Contracts
- As the Financial Controller updates the metadata, Laserfiche Workflow automatically moves the contract between the folders.



Once the Controller approves the contract, the final contract is saved.

- Using [Transparent Records Management](#), the actual contract is stored directly in the records management interface.
- For simplicity, a shortcut is provided to the Financial Controller.

Workflow Design

Throughout the process, Laserfiche Workflow has updated the metadata and routed the document according to the defined business process.

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